IM Workload Reduction Initiatives

Project	Implementation Date	IM Workload Impact	Status
SSI Auto Update	January 2003	This change means that workers no longer have to work their SSI DX matches.	Completed – 1/04/03
Exclude Student Financial Aid as Income	March 2003	This change means that workers no longer have to determine the amount of countable student financial aid received by the student.	Completed – 3/21/03
Alerts Re-engineering	March 2003	Makes the alerts more focused on worker actions, as opposed to creating alerts that are informational only. Also adds more specific direction in the help text associated with alerts.	Completed 3/21/03
DX Re-engineering	April 2003	Filters out many of the DX dispositions in which workers determined that they did not have to take action.	Completed 4/18/03
Self Declared Assets for Food Stamps	May 2003	This change means that workers no longer have to verify assets in determining FS eligibility.	Completed 5/23/03
Change Driver Flows – Adds 'driver flows' to CARES for address, expense, unearned income, assets and earnings. CY04 & CY05 Savings	June 2003	This change means that workers will no longer have to 'hunt' for the screens that need to be changed when the client reports a change.	Completed 6/20/03
Earned Income Calculation – Adds logic to CARES to correctly calculate monthly, budget-able income for Food Stamps and Medicaid based upon current Food Stamps and Medicaid policies from basic income information entered by the eligibility worker. CY04 & CY05 Savings	June 2003	Workers will now enter basic earnings information (wage per hour, hours worked, pay day schedule) and CARES will calculate the correct income amount for Food Stamps and Medicaid.	Completed 6/20/03
Elimination of the 100-Hour Rule – Removes a policy for two parent households where AFDC-Medicaid eligibility is dependent upon the primary wage earner being under- employed. CY04 & CY05 Savings	July 2003	Workers will no longer have to collect and enter the number of hours that the primary wage earner has worked in the current and previous 2 calendar months.	Ready to move when the budget is enacted.
Simpler Spousal Impoverishment Asset Share – The community spouse asset share will no longer be the result of a complicated policy, but will always be $50,000. CY04 & CY05 Savings	July 2003	Workers will no longer have to determine the assets of the couple when one spouse was institutionalized. They will no longer have to explain the complicated process for arriving at the asset share amount.	JFC deleted this provision from the Governor's Budget Proposal.
Food Stamps Reduced Reporting – Policy change that requires FS participants to report only those income changes that will bring their income above the 130% of the federal poverty level. This change would also implement a 12-month certification period with a 6-month pre-printed, scan-able change form for participants. Part of FFY01 FS Reinvestment Plan	July 2003 Phase 1 (change reporting policy and add language to notice) – January 2004 Phase 2 (scan-able preprinted change form & 12 month certification period)	Dramatically reduces the number of Food Stamp reviews and the number of changes that will be reported.	Reduced Reporting Waiver of FS rules was approved on 6/18/03. Phase I CARES changes will be implemented on July 25, 2003.

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CY05 Savings	January 2004 Phase 3 (freeze FS benefits except for increases) – July 2004		
Notice Redesign, Phase II & III- All Medicaid subprograms will be consolidated into four basic categories in the notices (Family, EBD, MPA and LTC) to reduce the number printed and eliminate confusion. In addition, the system will no longer create or send out denials for programs that were not requested. CY04 & CY05 Savings	September 2003 & November 2003	This change should reduce the amount of time that workers have to spend explaining notices to applicants and recipients.	Phase II will be implemented on September 19th, 2003. Phase III will be implemented on November 21, 2003.
Unemployed Compensation Benefits DX Re-engineering – Use UC data from DUI to provide workers with the information and tools necessary to make more accurate eligibility determinations for cases that include members receiving UC Income. Part of FFY01 FS Reinvestment Plan CY04 & CY05 Savings	September 2003	Workers will no longer have to take an action on data exchanges from these sources.	Project has changed to provide workers with more up-to-date information and basic tools to calculate the correct UC amount each month. This will be implemented on September 18, 2003.
Automated Case Directory – A tool that would allow workers and supervisors to manage their cases more effectively by allowing access to CARES data about their cases and the ability to search and sort that data according to their immediate needs (e.g., which reviews are due this month? how many food stamp cases with earnings do the workers in my unit have?) CY04 & CY05 Savings	August 2003	Workers and their supervisors would have direct access to information about their cases that could help them organize their workload in the most efficient way.	Work Group has completed high-level business requirements and design. These have been shared and reviewed by the IMAC IT Subcommittee. Business Requirements meetings have begun. This is scheduled to be implemented on August 22, 2003.
Auto Update of New Hire Data Part of FFY01 FS Reinvestment Plan CY05 Savings	September 2003	Workers will no longer have to take an action on data exchanges from these sources.	The high level business requirements and design have been approved. Detailed business requirements meetings are taking place. This is scheduled to be implemented September 18, 2003.
Centralized Change Center – Counties could contract with existing change centers or the state to handle changes for all or some IM cases. CY04 & CY05 Savings	September 2003	Workers in these counties would no longer have to answer calls from program participants regarding changes and enter data into CARES. In addition, local agencies would not be setting up individual Call Centers incurring additional costs.	Milwaukee, Dane and Washington Counties have implemented Change Centers. LaCrosse and Outagamie Counties are working on implementation of a Change Center. DHFS has begun analysis of a centralized Change Center.

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Transitional FS Benefits – families that lose TANF cash benefits will be eligible for several months of FS benefits regardless of changes in their financial situation. Not included in CY04 or CY05 savings.	December 2003	Cases in FS Transitional Status will not be reporting changes.	FS policy analysts are scheduled to begin analysis soon. This will be shared with the IMAC Program & Policy Coordination Subcommittee.
Automatic Update from Other Trusted Third Party Sources (SSA, KIDS, etc.) Part of FFY01 FS Reinvestment Plan CY05 Savings	Expansion to other sources (SSA, UC, KIDS, etc.) September 2004	Workers will no longer have to take an action on data exchanges from these sources.	Will begin work after the Auto Update of New Hire and the Re-engineering of the UC Data Exchange process.
Web-Based User Interface for CARES – Instead of using the CARES mainframe screens with PF-keys and reference tables, CARES data entry and query would be through the internet with web-based screens. The new interface would also use an intelligent driver flow process that would limit the information requested from the applicant to that data necessary to determine eligibility based upon their program request(s) and who they are (family, elderly, disabled, etc.) CY05 Savings	August 2004	Workers would have a more user-friendly, intuitive system for entering and querying data. Navigation, data entry (pull-down menus, etc.) and help screens would be easier to use. In addition, the Intelligent Driver Flow will reduce the amount of information (and verification) that workers are asked to collect and enter. These changes should also reduce new worker training by at least one week per worker.	Work on the technical specifications for the web-based interface has begun. Work plans have laid out the different work groups necessary and timelines to meet this date.
Web-based Customer Service Toolbox – Four Internet tools that allow customers to screen themselves for state and local programs, query benefit and case information, report changes and apply for Food Stamps and Medicaid. No savings were associated with this project in either CY04 or CY05	Screener / Query – February 2004 Change Reporting & Application for Services – October 2004.	Workers and receptionist would answer fewer questions regarding potential eligibility for state and local programs, as well as questions about benefit and case status. With the Application and Change Reporting, workers would no longer have as much entry of application and change data into CARES.	Pending FS Program Participation Grant decision by the USDA's Food and Nutrition Services.
On-Line Handbooks Connected to the Web-Based User Interface – The Medicaid and Food Stamps handbooks, as well as other process descriptions, would be available through the Internet and would be connected directly to the CARES User Interface. CY05 Savings	MA On-line handbook (February 2004) Integration with Web Tool (September 2004)	Workers would no longer need to maintain a paper handbook. Workers would no longer need to search for the appropriate policy associated with the action they were taking on a particular case.	The high level business requirements have been identified. Deloitte Consulting staff are working on three options for proceeding.
Scan-able Medicaid and Food Stamps Application Processing & Pre-Printed Review Forms – The state creates the capability for all mail-in applications to be sent to a centralized scanning center where applications would be scanned. Data streams (and optical image capture) would then be sent to the in-box of the local agency worker. All data from the application would auto-populate the CARES screens. The same capability would be available for mail-in pre-printed review	September 2004	Workers would no longer have to key mail-in applications and reviews into the system. Intake and review interviews would involve reviewing, rather than entering, the information provided by the applicant/participant.	Not started

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forms. No savings were associated with this project in CY04 or CY05.			
Verification Scanning Pilot – Milwaukee – DHFS would work with Milwaukee to develop a desktop solution to allow workers to optically scan and store verification documents for IM cases and create an electronic case file connected with the CARES case. In addition, this system will also be able to generate customer forms to be sent out centrally to applicants and recipients. Part of FFY01 FS Reinvestment Plan No savings were associated with this project in CY04 or CY05	Unscheduled	Workers would no longer have to maintain and access paper case files, but could see their cases (and cases transferred to them) through their desktop.	Bob Martin and Jim Jones are working on a concept paper to share with Milwaukee County representatives.
Benefit Recovery System Changes No savings were associated with this project in CY04 or CY05	Unscheduled	Workers have stated that the Benefit Recovery system is difficult for them to use. Time spent on this process would decrease and collections of overpayments would increase with these changes.	Not Started
1 Month Medicaid Deductible – calculate Medicaid deductibles over a one month period, enroll these individuals and then use the SeniorCare deductible and spenddown models which rely on Point of Service devices to track bills/expenses. No savings were associated with this project in CY04 or CY05	Unscheduled	Would virtually eliminate the workers current task of entering bills into CARES for the current 6 month deductible period.	Not Started